

SENDER'S INITIALS

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CENTRAL INTELLIGENCE AGENCY  
OFFICIAL ROUTING SLIP

TO	NAME AND ADDRESS	INITIALS	DATE
1	Office of the DD/S		
2			
3			
4			
5	RECORDS MANAGEMENT DIVISION		
6			

ACTION	DIRECT REPLY	PREPARE REPLY
APPROVAL	DISPATCH	RECOMMENDATION
COMMENT	FILE	RETURN
CONCURRENCE	INFORMATION	SIGNATURE

Remarks:

1. Here's the material for continuing the DD/S reports management program that we discussed recently. In addition to the proposed DD/S Notice, I've attached a report on reports management activity during FY 56. It shows that the annual reporting workload of headquarters has been reduced by 6670 hours, and that reports management programs are going forward also in the DD/I and DD/P areas.

2. Experience has shown that reports management is most successful when continued on a broad base and given support and direction by the top official of the organization. Hence the need for a DD/S directive on the program. The proposed notice will

FOLD HERE TO RETURN TO SENDER

NAME, ADDRESS AND PHONE NO.

DATE

Records Mgt. Staff,

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answer this need. It has been reviewed and concurred in by the Reports Management Officers designated in accordance with  Memo of 9 Sept 1955 (copy attached).

3. I'll be glad to discuss this program further with you.

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STAT

[redacted] Reports Mgr  
Hold For Discussion  
With [redacted] DBS Office

STAT

Discussed over Telephone With [redacted]  
on 5/17/56 - He will call me when  
He's Ready - 6/15. Called Again

STAT

~~CONFIDENTIAL~~DEPUTY DIRECTOR (SUPPORT)  
NOTICE NO. DD/S Notice No. RECORDS MANAGEMENT  
Draft 7-17-56

## REPORTS MANAGEMENT PROGRAM

## 1. PURPOSE

Reports are vital to our support mission and to the efficient administration of our internal affairs. Reports also make up a large portion of our paperwork. For these reasons we are obligated to assure that essential reports of the right type and highest quality meet our needs efficiently and economically. Such assurance can result from a systematic continuing review of our requirements for reports. This notice therefore provides for this review by establishing a Reports Management Program for all components under the Deputy Director (Support).

## 2. PROGRAM OBJECTIVES

The DD/S Reports Management Program is established to ensure that:

- a. Reports provide adequate, accurate and timely data for the purposes required.
- b. Reporting workloads are minimized and restricted to the capabilities of preparing and using components; and that peakloads and overtime are avoided.
- c. Only essential reports are established or continued.
- d. Reports are appropriate to the missions of using components; and that preparing components are the best sources of the data.
- e. Reporting procedures and systems are simple and orderly.
- f. Instructions, definitions, and forms are clear and complete.
- g. Existing sources of information are publicized.

## 3. DEFINITIONS

- a. Report An account or statement of information in written narrative, tabular, punch card, or graphic form, transmitted from one organizational element to another in response to an expressed or assumed need for information.
- b. Administrative or Management Report. A report that provides for administrative or management control over an activity or operation, as distinguished from an operational or intelligence report.

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- c. Recurring Report. A report for which there is a standing requirement for its submission. It may be either a periodic report which conveys essentially the same type of information at prescribed intervals (daily, weekly, monthly, etc.), or a situation report which is prepared on each occurrence of an event of certain prescribed characteristics (e.g., report of an accident).
- d. Internal Report. A report submitted solely within a DD/S Office or Staff.
- e. External Report. A report required from, or prepared for, any organization outside a DD/S Office or Staff.

4. PROGRAM ADMINISTRATION AND SCOPE

- a. All components under the DD/S shall participate in the program on a decentralized basis. That is, each Office or Staff is responsible for establishing measures to control and improve internal reports, and for coordinating requirements for external reports with the Records Management Officer for Reports, Management Staff. Under this concept, decentralized programs can be tailored to meet the specific needs of components, with top level support and guidance being provided to ensure that the overall objectives of the DD/S Program are realized. The Records Management Officer for Reports, Management Staff, and the Office and Staff Reports Management Officers will comprise a panel to resolve reporting problems of mutual concern to all components.
- b. Attachment 1 is a basic guide for operating an Office or Staff reports management program. Reports Management Officers shall apply this guide in conducting their programs. Adaptations or modifications are encouraged to meet the particular needs of a component. However, such adaptations must fulfill the requirements of this notice.
- c. With the exception of the types of documents listed in Attachment 2, each Office or Staff program shall cover all recurring administrative or management reports:
  - (1) Submitted internally between divisions and staffs, or
  - (2) Received from or submitted to other headquarters components, domestic or overseas field installations, or organizations, Federal or private, outside the Agency.

Emphasis shall thus be placed on managing all recurring reports, whether prepared voluntarily, upon request, or by direction. However, this should not preclude the screening and reviewing of one-time reports, if by such action nonessential or inadequate reporting can be prevented. In addition, controls over internal reports submitted across organizational lines below the division or staff level may be established if considered necessary.

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## 5. POLICIES

- a. Each proposal to establish or revise an internal report shall be cleared through the Office or Staff Reports Management Officer. Each proposal to establish or revise an external report shall be coordinated with the Records Management Officer for Reports, Management Staff.
- b. Each approved requirement for a report shall be assigned a reports control symbol. Reports exempted from control shall be so identified. Reports control symbols or exemption statements shall be cited in report directives and in reports submitted accordingly. Personnel receiving a report directive which does not cite either a reports control symbol or an exemption clause shall so notify their Reports Management Officer and defer complying with the directive pending notification that the reporting requirement has been approved.
- c. Existing reporting requirements approved in accordance with this notice shall be reappraised at least annually. New or revised requirements shall be reappraised initially within from three to six months after submission of the first report and annually thereafter.

## 6. RESPONSIBILITIES

- a. The Records Management Officer for Reports, Management Staff, shall:
  - (1) Direct and coordinate the overall program by providing staff guidance and all basic plans, policies, and procedures.
  - (2) Assign reports control symbols to approved requirements for external reports.
  - (3) Conduct studies and reappraisals of, maintain records on, and publish lists of requirements for external reports.
- b. Each Office Director or Staff Chief shall:
  - (1) Ensure that an active program for controlling and improving reports is carried out within his organization.
  - (2) Designate an official to serve as Reports Management Officer for his component. The name of this official shall be furnished the Records Management Officer for Reports, Management Staff.

## 7. PROCEDURES

- a. Request for Approval of a New or Revised Reporting Requirement. Any proposal to establish or revise a reporting requirement shall be submitted to the appropriate Office or Staff Reports Management Officer. The originator shall submit the following material:

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- (1) An original and one copy of Form No. 142 (Attachment 3).
- (2) An original and one copy (in draft form) of the proposed report directive, including all forms, instructions, and procedures proposed to be issued.
- (3) Any additional supporting material that will assist approving officials with their review.

If the proposal concerns an external report, the Records Management Officer shall place his recommendations on a copy of the Form No. 142 submitted to him, and forward it with a copy of all supporting material to the Records Management Officer for Reports, Management Staff.

- b. Transmitting copies of Directives. Immediately upon issuing a directive which initiates, revises, or rescinds a reporting requirement, the originator shall forward a copy of the directive to the Reports Management Officer of his component. A copy of all directives having a bearing on external reports, or concerned with operating an Office or Staff Reports Management Program, shall be furnished the Records Management Officer for Reports, Management Staff.
- c. Reporting Results of the Program.

- (1) The progress report (Reports Control Symbol S-Rep-92) described in paragraph 2, page 18, of the attached guide "Operating an Area Reports Management Program," shall be submitted to the Chief, Management Staff, Attn: Records Management Officer for Reports, for each calendar quarter beginning with the quarter ending 30 September 1956. The report shall be forwarded by the 15th of the month following the end of the quarter.
- (2) The outline for compiling the statistical summary shall be adhered to so that reports from the various components are comparable. Reports Management Officers may use their own discretion in adapting the suggested format for the narrative summary. The following Staffs are exempted from this reporting requirement because of the small volume of reports with which they are concerned: General Counsel, Audit Staff, Project Administration Planning Staff, Commercial Staff, and the SSA-DD/S.

L. K. WHITE  
Deputy Director  
(Support)

ATTACHMENTS:

1. Guide, "Operating an Area Reports Management Program"  
(1A, 2A, 5A, 6A distribution only)

ATTACHMENTS (cont'd)

2. Types of Reports and Documents  
Exempted from the DD/S Reports  
Management Program
3. Form No. 1h2, Request for Approval  
of a New or Revised Reporting Re-  
quirement.

DISTRIBUTION:

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